

Instructions for New RFP Template

1. Introduction

Guidelines for filling in the blanks in Section 1, Introduction.

1.1 Purpose of Procurement

This should be a brief statement of why the RFP is being issued – what service or product is being procured, and why. Reserve comments on the history behind the procurement for Section 1.7 “Background.”

1.3 Schedule of Events

Fill in the appropriate dates for the events listed in the schedule. Be realistic in setting deadlines for Offeror responses and in calculating the time it will take the agency to respond to questions and evaluate the proposals.

1.4 Restrictions on Communications with Staff

Fill in the name of the agency and the issuing officer. Fill in the agency’s address and issuing officer’s e-mail and/or Fax number appropriately for how proposals will be received (i.e. mail only, e-mail only, Fax only, or any combination of the three).

1.5 Definition of Terms

The definitions listed in this section of the template are the minimum definitions required for any RFP. Additional terms may be included as appropriate for a specific RFP.

1.6 Contract Term

Fill in the appropriate contract term.

1.7 Background

The background statement should provide the historical information necessary for an Offeror to create a responsive proposal. The statement should not include an entire agency and/or program history – only the background information essential to the Offeror’s understanding of the solution being sought.

2. Mandatory Requirements

Mandatory requirements are the pass/fail component of the RFP. In this section, specify those requirements an Offeror must absolutely fulfill. Any proposal not meeting all mandatory requirements will be eliminated from consideration. A guideline which might be helpful in developing mandatory requirements is:

If it turns out the Offeror can do everything asked for in the RFP, except this one requirement, will the Offeror not be awarded the contract? If the Offeror would still be awarded the contract, then the requirement is not mandatory.

2.1 Offeror Qualification Requirements

In this section list the qualifications the Offeror must have; such as specific certifications, licenses, or subject matter knowledge.

2.2 Business Requirements

The Offeror's proposed solution will be set out in detail in response to section 3.2, but in this section list the components of the Offeror's proposed solution which absolutely must be present.

3. Technical Proposal

Section 3 asks for certain background information from the Offeror, and sets out the requirements which must be met by the Offeror's proposed solution.

3.1.2 Experience

In this section ask for the number of years of experience the Offeror has in a certain capacity or performing a specific job. The number of years must be reasonable and justifiable. Requiring an Offeror to have five years experience must mean an Offeror with four years experience couldn't do the job.

3.2 Proposed Solution

Section 3.2 is the section in which the agency tells the Offeror what they want the Offeror to do for them. In this section, clearly and specifically state every requirement the Offeror should address in the proposal. Mandatory requirements, identified in section 2.2 should be restated in this section, along with previously unstated requirements which are important but not mandatory.

This section should identify performance and delivery expectations. The requirements stated in this section should provide the Offeror with the necessary information to prepare a meaningful response which can be easily evaluated on its merits and responsiveness to the agency's needs. The information asked for in this section should allow the Offeror to create a workable solution which can be readily converted to an enforceable contract.

Requirements established in this section should be divided into categories for ease of evaluation, as further explained in section 4.2.3.

4. Proposal Submission and Evaluation

This section provides instructions to Offerors on how proposals are to be submitted, and describes the evaluation process.

4.1.2 Packaging of Proposals

Subsection 2 of this section requires the Offeror to submit the Financial Proposal (proposed cost) on the form provided as Appendix D. Appendix D will need to be developed by the agency to solicit the cost information of a nature and in a format suitable for the specific procurement.

4.1.4 Submission of Proposals

Fill in the details (as already stated in section 1.4) of to whom the proposal must be submitted.

4.2.3 Technical Proposal Evaluation

The first step in completing section 4.2.3 is to determine the relative importance between the technical solution and the financial proposal. In a procurement where the quality of the solution is more important than the cost, more points will be designated for the technical proposal than for the financial proposal. The highest possible total score for a proposal, combining the technical and financial proposals, is 1000 points. One common division of points between technical and financial proposals is 600-technical and 400 financial.

Filling in the Blanks in section 4.2.3

The first blank in section 4.2.3 should contain the maximum number of points available to a technical proposal. For the purpose of an example, consider the technical proposal to be worth a maximum of 600 points and the financial proposal a maximum of 400. Thus, 600 would be entered into this first blank.

Below the blank for the maximum points for the technical proposal is an area to specify how those points will be divided among the different categories which were specified in section 3.2 as components of the Proposed Solution.

In the blank immediately following the section for points by category, the maximum number of points, in this example 600, will again be entered. This is the score to which the highest scoring proposal is adjusted.

The next blank reflects the score a proposal must receive in order for the accompanying financial proposal to be evaluated. This score is usually 75% of the highest possible score. Still following the example of 600

maximum points, and using a 75% threshold for further consideration, 450 would be entered into this blank.

4.2.5 Financial Proposal Evaluation

Filing in the Blanks in section 4.2.5

The blanks in this section will be filled out based on the division of points between the technical solution and the financial solution. Staying with the 600/400 point split example, 450 would be entered into the first blank in section 4.2.5.

With regard to both the second and third blanks: The maximum number of points available for the financial proposal will be entered – in this case, 400.